THOMPSON OKANAGAN COMMUNITY RESEARCH

2018 - 2019 Visitation Summary

Not for Circulation or Public Distribution

All Research is subject to the signing of a non-disclosure agreement (NDA) and cannot be shared with third-parties or anyone outside the organization.
RESEARCH PROGRAM

Research options for Destination Marketing Organizations and Regional Districts.

• Integrated Research Program consisting of both Visitor and Market Research utilizing data from Environics Analytics and TELUS Insights.

• Program intended to benefit DMO’s, Local and Regional Government and Operators.

• All Research is subject to the signing of a non-disclosure agreement (NDA) and cannot be shared with third-parties or anyone outside the organization.
DATA AND PRIVACY

• TELUS recognizes that Big Data comes with big responsibility to protect the privacy of individuals. They have implemented industry-leading standards to protect privacy every step of the way through:
  • De-Identification of data – meaning it cannot be traced back to an individual.
  • Aggregation of data into large data pools ensuring privacy is fully protected at all times.
  • Data extrapolation to be representative of the total Canadian Population.
• By de-identifying and aggregating the data, it is possible to perform geographic and movement analysis, while respecting privacy.
DATA AND PRIVACY

• TELUS has implemented industry-leading Privacy and Design standards to ensure that privacy is not compromised.

• All the data analyzed by TELUS Insights is de-identified, meaning it cannot be traced back to an individual. It is also aggregated into large data pools to reveal mass-movement patterns and trends, and extrapolated to be representative of the total Canadian population as a further means of ensuring their privacy is protected at all times.

• For further information, please visit:
  • telus.com/insights
  • Or Email: telusinsights@telus.com
METHODOLOGY

Data was collected off of cellular network towers throughout the Thompson Okanagan to deliver insightful information on regional tourists.

Each tower is oriented to a specific region in order to determine where the visitors are within the area.

In order to be counted as a visitor to the region, a tourist must spend a minimum of 90 minutes stopped at a single location. Total Year to Date Visitation breaks down those visitors by 90 minutes as well as Single Overnight Stays.

Overnight guests were calculated based on where they spent the majority of nighttime hours (between 11:00 pm and 6:00 am).

Information available includes:

Regional Visitation
- 90 minutes (Day Trippers)
- Single Overnight Stay

Visitor Origin
- Province
- Country

Overnight Stay
- Length of Stay
- Repeat Visitation

Regional Movement
- Canada
- International
REGIONAL VISITATION
2018 - 2019
**Key Findings Unique Visitation by Month:**

- **Note:** The Thompson Okanagan Region experienced localized flooding during the month of June 2018 and forest fires/heavy smoke during August 2018.

- Domestic Visitation increased by **14%** when comparing July 2018 to July 2019.
  - July was the peak month for domestic visitation in 2018 and 2019.

- Domestic visitation to the Thompson Okanagan Region increased by **76%** when comparing August 2018 to August 2019.

- International Visitation has remained consistent year over year (2018/2019) despite the level of natural disasters that occurred in Summer 2018.

- 2018 and 2019 International Visitation both peaked in August with an increase of **2%** when comparing August 2018 to August 2019.
Key Findings Unique Visitation by Month:

- **Note:** The Thompson Okanagan Region experienced localized flooding during the month of June 2018 and forest fires/heavy smoke during August 2018.

- Domestic Day Trip Visitation increased by **16%** when comparing July 2018 to July 2019.
  - July was the peak month for domestic visitation in 2018 and August was the peak month in 2019.

- Domestic visitation to the Thompson Okanagan Region increased by **69%** when comparing August 2018 to August 2019.

- International Visitation has remained consistent year over year (2018/2019) despite the level of natural disasters that occurred in Summer 2018.

- International Day Trip Visitation decreased by **5%** when comparing July 2018 to July 2019.
  - July was the peak month for international visitation in 2018 and August was the peak month in 2019.

- International visitation to the Thompson Okanagan Region increased by **9%** when comparing August 2018 to August 2019.
**Key Findings Unique Visitation by Month:**

- **Note:** The Thompson Okanagan Region experienced localized flooding during the month of June 2018 and forest fires/heavy smoke during August 2018.

- Domestic Minimum One Night Stay Visitation increased by **14%** when comparing July 2018 to July 2019.
  - July was the peak month for domestic visitation in 2018 and 2019.

- Domestic visitation to the Thompson Okanagan Region increased by **77%** when comparing August 2018 to August 2019.

- International Visitation has remained consistent year over year (2018/2019) despite the level of natural disasters that occurred in Summer 2018.

- 2018 and 2019 International Visitation both peaked in August with an increase of **1%** when comparing August 2018 to August 2019.
SEASONAL YEAR IN REVIEW
2018 - 2019
Thompson O'kanagan 2019 Seasonal Year in Review – British Columbia
Domestic Average Monthly Visitation

**Overview**

- The peak season for average monthly BC visitation in 2019 is Summer, followed by Fall, Spring, and Winter.
- Vancouver dominates in visitor origin across all four seasons.
- Although Free Spirits are dominant in the Vancouver Market, other Explorer Types (EQ) must be considered by areas in Vancouver.
- Personal History Explorers from Surrey represent the second largest market across all seasons, followed by No Hassle Travellers in Prince George (for all seasons except Fall where Authentic Experiencers in Prince George are the top EQ Type).

### Winter (December, January, February 2019)

<table>
<thead>
<tr>
<th>Top Cities and EQ Types</th>
<th>Market Composition</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Base Count</td>
</tr>
<tr>
<td>Vancouver</td>
<td>Free Spirits</td>
</tr>
<tr>
<td>Surrey</td>
<td>Personal History Explorers</td>
</tr>
<tr>
<td>Prince George</td>
<td>No Hassle Travellers</td>
</tr>
<tr>
<td>Victoria</td>
<td>Cultural History Buffs</td>
</tr>
<tr>
<td>Chilliwack</td>
<td>No Hassle Travellers</td>
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</tbody>
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### Summer (June, July, August)

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<tr>
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</tr>
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### Fall (September, October, November)

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Note: Visitation numbers use the minimum 90-minute stay in region definition and are based on seasonal monthly averages, rounded to the nearest 100 and not total unique visitor count.
Thompson O'kanagan 2019 Seasonal Year in Review – Alberta

Domestic Average Monthly Visitation

**Winter (December 2018, January, February 2019)**

- The peak season for average monthly Alberta visitation in 2019 is **Summer**, followed by Fall, Spring, and Winter.
- **Calgary** dominates in visitor origin across all four seasons.
- **Authentic Experiencers** are the top EQ Type across all seasons (with the exception of Fall where **Free Spirits** from Calgary rank first).
- **Gentle Explorers** from Edmonton represent the second largest market across all seasons (with the exception of Fall where **Free Spirits** from Edmonton rank first), followed by **Personal History Explorers** in the **La Crete Area**.

**Alberta EQ Composition 2019**

- **Calgary**
  - **Authentic Experiencers** 27%
  - **Gentle Explorers** 23%
- **Edmonton**
  - **Gentle Explorers** 23%
- **La Crete Area**
  - **Personal History Explorers** 42%
- **Fort McMurray**
  - **No Hassle Travellers** 78%

**Spring (March, April, May)**

- **Calgary**
  - **Authentic Experiencers** 27%
- **Edmonton**
  - **Gentle Explorers** 23%
- **La Crete Area**
  - **Personal History Explorers** 42%
- **Fort McMurray**
  - **No Hassle Travellers** 79%

**Summer (June, July, August)**

- **Calgary**
  - **Authentic Experiencers** 27%
- **Edmonton**
  - **Gentle Explorers** 23%
- **La Crete Area**
  - **Personal History Explorers** 42%
- **Fort McMurray**
  - **No Hassle Travellers** 78%

**Fall (September, October, November)**

- **Calgary**
  - **Free Spirits** 37%
- **Edmonton**
  - **Free Spirits** 36%
- **Onoway**
  - **Virtual Travellers** 32%
- **Fort McMurray**
  - **Virtual Travellers** 33%
- **Grande Prairie**
  - **Virtual Travellers** 33%

**Note:** Visitation numbers use the minimum 90 minute stay in region definition and are based on seasonal monthly averages, rounded to the nearest 100 and not total unique visitor count.

**Note:** Base Count = Population 15+ within the custom target area (Composed of top-ranking Visitor Origin FSA's. Percentages relate to the EQ composition within the custom Target Area.
The Peak season for average monthly BC visitation in 2018 is Summer, followed by Spring, Winter and Fall.

Vancouver dominates in visitor origin across all four seasons.

Although Free Spirits are dominant in the Vancouver Market, other Explorer Types (EQ) must be considered by areas in Vancouver.

Personal History Explorers from Surrey represent the second largest market across all seasons, followed by No Hassle Travellers from Prince George (Spring and Winter), Authentic Experiencers from Abbotsford (Summer) and No Hassle Travellers from Abbotsford (Fall).

Note: Visitation numbers use the minimum 90 minute stay in region definition and are based on seasonal monthly averages, rounded to the nearest 100 and not total unique visitor count.

Note: Base Count = Population 15+ within the custom target area (compiled of top ranking Visitor Origin FSA's). Percentages relate to the EQ composition within the custom Target Area.
Thompson O'kanagan 2018 Seasonal Year in Review – Alberta
Domestic Average Monthly Visitation

Overview

- The peak season for average monthly Alberta visitation in 2018 is Summer, followed by Spring, Fall, and Winter.
- Calgary dominates in visitor origin across all four seasons.
- Free Spirits in Calgary are the top EQ Type across all seasons.
- Gentle Explorers from Edmonton represent the second largest market across all seasons, followed by No Hassle Travellers from the La Crete Area.

Alberta EQ Composition 2018

- Note: Visitation numbers use the minimum 90 minute stay in region definition and are based on seasonal monthly averages, rounded to the nearest 1,000 and not total unique visitor count.
- Note: Base Count = Population 15+ within the custom target area (composed of top ranking Visitor Origin FSA's). Percentages relate to the EQ composition within the custom Target Area.

Winter (December 2018, January, February 2018)

- Top Cities and EQ Types
- Market Composition

Spring (March, April, May)

- Top Cities and EQ Types
- Market Composition

Summer (June, July, August)

- Top Cities and EQ Types
- Market Composition

Fall (September, October, November)

- Top Cities and EQ Types
- Market Composition
AVERAGE MONTHLY VISITATION
BY SEASON
**Overview**

**Domestic Average Monthly Visitation - Spring**

- Throughout Spring 2018 the Thompson Okanagan saw an average of 424,600 Domestic Unique Visitation per month. During the same time period in 2019, the Region saw an average of 349,700 Domestic Unique Visitation per month, a decrease of 18% season over season, year over year.

- The decrease is consistent across all Provinces, with the exception of the Northwest Territories, up 22% and Prince Edward Island, up 3% when comparing average monthly visitation in Spring 2018 and 2019.

- **Note:** there was no ranking average seasonal visitation from Nunavut in Spring 2018 or Spring 2019.

- Throughout Spring 2018 the Thompson Okanagan saw an average of 61,400 International Unique Visitation per month. During the same time period in 2019, the Region saw an average of 80,600 International Unique Visitation per month, an increase of 31% season over season, year over year.

- The increase is consistent across the top countries, with the exception of Australia, down 3% when comparing average monthly visitation in Spring 2018 and 2019.

**International Average Monthly Visitation - Spring**

- **Canada**
  - Decrease of 18% Spring 2018 over Spring 2019.

- **International**
  - Increase of 31% Spring 2018 over Spring 2019.

**Note:** All numbers are based on seasonal monthly averages and not total unique visitor count.

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*All Percentages relate to an increase or decrease in Average Monthly Visitation Counts when comparing Spring (March, April, May) 2018 to Spring (March, April, May) 2019.*

*Note: Visitor Data provided by TELUS Insights excludes residents of the Thompson Okanagan Region. All data analyzed by TELUS Insights is de-identified and aggregated into large data pools to ensure privacy is protected at all times.*
Summer 2018 vs. Summer 2019: Domestic and International Average Monthly Visitation by Season

**Thompson Okanagan Region**

**Overview**

- Throughout **Summer 2018** the Thompson Okanagan saw an average of 543,700 Domestic Unique Visitation per month. During the same time period in **2019** the Region saw an average of 730,300 Domestic Unique Visitation per month, an increase of 34% season over season, year over year.

- The increase is consistent across all Provinces when comparing average monthly visitation in Summer 2018 and 2019.

- **Note:** there was no ranking average seasonal visitation from Nunavut in Summer 2018 or Summer 2019.

- Throughout **Summer 2018** the Thompson Okanagan saw an average of 162,300 International Unique Visitation per month. During the same time period in **2019** the Region saw an average of 174,500 International Unique Visitation per month, an increase of 8% season over season, year over year.

- The increase is consistent in the United States and the United Kingdom. Australia and Mexico both decreased by 18% and China decreased by 10% comparing average monthly visitation in Summer 2018 and 2019.

**Domestic Average Monthly Visitation - Summer**

- **2019 =** 730,300
- **2018 =** 543,700

**Canada**

Increase of **34%**
Summer 2018 over Summer 2019.

**International Average Monthly Visitation - Summer**

- **2019 =** 174,500
- **2018 =** 162,300

**Note:** All numbers are based on seasonal monthly averages and not total unique visitor count.

*All Percentages relate to an increase or decrease in Average Monthly Visitation Counts when comparing Summer (June, July, August) 2018 to Summer (June, July, August) 2019.*

**Note:** Visitor Data provided by TELUS Insights excludes residents of the Thompson Okanagan Region. All data analyzed by TELUS Insights is de-identified and aggregated into large data pools to ensure privacy is protected at all times.
Fall 2018 vs. Fall 2019: Domestic and International Average Monthly Visitation by Season

Thompson Okanagan Region

Overview

- Throughout Fall 2018 the Thompson Okanagan saw an average of 272,600 Domestic Unique Visitation per month. During the same time period in Fall 2019 the Region saw an average of 418,500 Domestic Unique Visitation per month, an increase of 54% season over season, year over year.

- The increase is consistent across all Provinces, with the exception of Manitoba, down 35% and Prince Edward Island, down 6% when comparing average monthly visitation in Fall 2018 and 2019.

- Note: there was no ranking average seasonal visitation from Nunavut in Fall 2018, resulting in a total increase for Fall 2019.

- Throughout Fall 2018 the Thompson Okanagan saw an average of 89,300 International Unique Visitation per month. During the same time period in Fall 2019 the Region saw an average of 97,700 International Unique Visitation per month, an increase of 9% season over season, year over year.

- The increase is consistent for the United States and the United Kingdom. Australia and Mexico decreased by 12% and 7% respectively. China decreased by 24% comparing average monthly visitation in Fall 2018 and 2019.

Note: *All numbers are based on seasonal monthly averages and not total unique visitor count.*

<table>
<thead>
<tr>
<th>Canada</th>
<th>Increase of 54% Fall 2018 over Fall 2019.</th>
</tr>
</thead>
<tbody>
<tr>
<td>International</td>
<td>Increase of 9% Fall 2018 over Fall 2019.</td>
</tr>
<tr>
<td>USA</td>
<td>39%</td>
</tr>
<tr>
<td>UK</td>
<td>36%</td>
</tr>
<tr>
<td>CHN</td>
<td>-24%</td>
</tr>
<tr>
<td>MEX</td>
<td>-7%</td>
</tr>
<tr>
<td>AUS</td>
<td>-2%</td>
</tr>
</tbody>
</table>

*Note: Visitor Data provided by TELUS Insights excludes residents of the Thompson Okanagan Region. All data analyzed by TELUS Insights is de-identified and aggregated into large data pools to ensure privacy is protected at all times.*
### Domestic Average Monthly Visitation - Winter

- Throughout **Winter 2018** the Thompson Okanagan saw an average of 263,300 Domestic Unique Visitation per month. During the same time period in **2019** the Region saw an average of 251,700 Domestic Unique Visitation per month, a decrease of **4%** season over season, year over year.

- The decrease is consistent for the following provinces: Newfoundland, down **9%**, Alberta, down **7%**, BC, down **5%**, the Yukon, down **4%** and Ontario, down **0.2%** when comparing average monthly visitation in Winter 2018 and 2019.

- **Note:** there was no ranking average seasonal visitation from Nunavut in Winter 2018 or Winter 2019.

- Throughout **Winter 2018** the Thompson Okanagan saw an average of 53,500 International Unique Visitation per month. During the same time period in **2019** the Region saw an average of 64,300 International Unique Visitation per month, an increase of **20%** season over season, year over year.

- The increase is consistent across the top 5 countries when comparing average monthly visitation in Winter 2018 and 2019.

- **Note:** All numbers are based on seasonal monthly averages and not total unique visitor count.

### International Average Monthly Visitation - Winter

- **Canada**
  - Winter 2018 over Winter 2019: Decrease of **4%**

- **International**
  - Winter 2018 over Winter 2019: Increase of **20%**

*All Percentages relate to an increase or decrease in Average Monthly Visitation Counts when comparing Winter (Jan, Feb, December) to Winter (Dec 2018, Jan 2019, Feb 2019). *Note: Visitor Data provided by TELUS Insights excludes residents of the Thompson Okanagan Region. All data analyzed by TELUS Insights is de-identified and aggregated into large data pools to ensure privacy is protected at all times.
ABOUT ENVIRONICS ANALYTICS

• Environics Analytics is one of North America’s leading data, analytics and marketing services companies.

• ENVISION 5 provides insights into more than 30,000 variables including demographics, consumer preferences, lifestyles and values.

• Environics Analytics Research provides a deeper understanding of customers and markets through geographic analysis and customized segmentation.

• Market Reports Available for:
  • BC
  • Alberta
  • Ontario
  • United States
ABOUT EQ

• Explorer Quotient, also known as EQ, was developed by Destination Canada in partnership with Environics Research Group.

• EQ is a proprietary market segmentation system based on the science of psychographics.

• EQ goes beyond traditional market research of defining people. It looks deeper at individuals’ personal beliefs, social values and views of the world to learn exactly why different types of travellers seek out entirely different travel experiences.

• For more information visit: https://www.destinationcanada.com/en/tools
APPLYING TELUS INSIGHTS TO ENVIRONICS ANALYTICS

- Using TELUS Insights counts by FSA and rolled up to the CSD/City level EQ Composition can be identified in Canada.

- Dominant EQ Types in the top three markets by BC, Alberta, Ontario are presented to aid in Target Marketing.

- Supporting EQ Market profiles provide demographics, psychographics, traditional and digital media habits for the Canadian Market.

- **Phase One** of the Research Analysis provides insights to determine marketing strategy and target markets.

- **Phase Two** of the Research Program provides custom services using Environics Analytics data sources based on your requirements such as:
  - Target Marketing by FSA – Direct to Agency
  - Sector (e.g. Hiking, Biking, Culinary)
  - Social Values (e.g. Global Consciousness, Multiculturalism)
  - Custom Variable Sets
RESEARCH SERVICES

• Market Profiles (Environics Analytics).
• Visitor Profiles (Environics Analytics and/or TELUS Insights).
• Market Segmentation Targeting (Environics Analytics and/or TELUS Insights).
• Digital Campaign Execution.
• Direct Marketing Strategy.
• Advertising Location Strategy.
• Additional TELUS Services based on your unique needs.
Contact: Simone Carlysele-Smith, Managing Director

Symphony Tourism Services, a subsidiary of the Thompson Okanagan Tourism Association

778-721-5448

sts@totabc.com

https://www.totabc.org/symphony-tourism-services